Overview

1. Create a new SDR.
2. Enter the following:
   - SDR reference number, if applicable
   - Service delivery information
   - Client- or SDR-level offsets, if applicable
   - SDR notes, if applicable

Important: After accessing the SDR, always **unlock all enrollments** before exiting.

3. Release the SDR.
4. Authorize the SDR.

Create an SDR

1. Click the **Billing** module. Select **Service Delivery Report Search** from the navigation bar.

   *The **Service Delivery Report Search** page appears.*
2. Click **[Add/Edit SDR]**.

   *The **Service Delivery Report** page appears.*
3. Select a contract from the drop down box; click **[Select Contract]**.
4. Select an activity from the drop down box; click **[Select Activity]**.
5. Select service period information from the drop down box.
6. Select a location from the drop down box.
7. Click **[View Service Period]**.

   *The **Service Delivery Report Summary** page appears.*
8. Click **[Add New SDR]** if no SDR details are found.

   The page reappears with a Regular SDR Draft link. To access the roster of clients click the link.

Note: An SDR for the current month cannot be created until all previous months on the contract have been authorized.

Access an Existing SDR

1. Access the **Service Delivery Report Search** page.
2. Enter search criteria.
3. Click **[Search]**.

   The search results appear.
4. Select an SDR.

   *The **Service Delivery Summary** page appears with the roster of clients.*

Enter SDR Reference Number (if applicable)

1. Access the **Service Delivery Summary** page.
2. Select **Service Delivery Header** from the navigation bar.

   *The **Service Delivery Header** page appears.*
3. Enter SDR Reference Number.
4. Click **[Save Changes]**.

   A message appears, "Record has been updated successfully."

Record Service Delivery Information

Service delivery information may be entered in a single or throughout the billing period and released at the end of the month.

Important tips:

- You can use the **Comments** field on the **Record Service Delivery** page to enter a note at the client-level.
- On the **Record Service Delivery** page to record or edit information for the next client in the list, click **[Next Client]** or to return to the previous client use **[Previous Client]**. To clear the Service Delivery Report Calendar, click **[Clear All]**.
- When you are finished entering information, always click **[Save Changes]**. If you **do not** save changes you will lose the data you've just entered.
- When you are finished with a session, click the **[Unlock All Enrollments]** button on the **SDR Summary** page. If you do not unlock the enrollments, other staff users may not be able to access the SDR.

Record Service Information for Multiple Clients at one time

Apply a Service Delivery Pattern:

1. Select **Service Delivery Pattern** from the navigation bar.
2. Complete the service delivery pattern information.
3. Select all clients who receive services in this pattern.
4. Click **[Apply Pattern]**.
   *Once the pattern is applied, the **Service Delivery Summary** page appears.*

Tip: Use **[Select All]** and **[Deselect All]** buttons to select or deselect all clients. After applying a pattern, services can never be removed, they can only be added. The pattern is irreversible. To adjust services, you must edit client records individually.

Note: The **Include disenrollment date** checkbox allows the user to bill for the disenrollment date. This is determined by each individual agency. Please be sure to confirm with your Agency Contract Manager.

Apply a Pattern to a Single Client

1. Access the **Service Delivery Summary** page.
2. Click the Enrollment Id link for a client.

   *The **Record Service Delivery** page appears with client details.*
3. Check off dates on calendar.
4. Enter a unit amount in the textbox located beneath the calendar.
5. Select an attendance status code from the drop down box located beneath the calendar.
6. Click **[Apply Pattern]**.
7. Click **[Save Changes]**.

Record or Edit Service Information for a Single Client

1. Access the **Service Delivery Summary** page.
2. Click the Enrollment Id link for a client.

   *The **Record Service Delivery** page appears with client details.*
3. Enter number of service units and attendance codes on calendar.
4. Click **[Save Changes]**.

   A message appears, "Record has been updated successfully."

Copy Service Delivery Information

1. Access the ***Record Service Delivery*** page for a client.
2. Enter service delivery information if needed. If changes were made click **[Save Changes]**.
3. Click **[Copy Characteristics]**.
4. Select one or more clients and click **[Apply Pattern]**.
   *The **Service Delivery Summary** page appears with the newly entered information.*

Tip: Use **[Select All]** and **[Deselect All]** buttons to select or deselect all clients.

Enter an Offset at the Client-Level (if applicable)

1. Access the **Record Service Delivery** page for a client.
2. Enter offset amount.
3. Select an offset reason from the drop down box.
4. Click **[Save Changes]**.

   A message appears, "Record has been updated successfully."

Important: If you apply an offset at the client-level, you **cannot** use an offset at the header-level.

Enter an Offset at the SDR Header- Level (if applicable)

1. Access the **Service Delivery Summary page.**
2. Select **Service Delivery Header** from the navigation bar.

   *The **Service Delivery Header** page appears.*
3. Enter offset amount.
4. Select an offset reason from the drop down box.
5. Click **[Save Changes]**.

   A message appears, "Record has been updated successfully."

Important: If you apply an offset at the header-level, you **cannot** use an offset at the client-level.

Add an SDR Note (if applicable)

1. Access the **Service Delivery Summary** page.
2. Select **Notes** from the navigation bar.

   *The **Service Delivery Notes** page appears.*
3. Click Add SDR note link if no SDR information was found or **[Add SDR Note]**.

   *The **Service Delivery Note Add** page appears.*
4. Enter note.
5. Click **[Save New SDR Note]**.

   *The **Service Delivery Notes** page appears with the entered note.*

Unlock All Enrollments

1. Access the **Service Delivery Summary** page.
2. Click **[Unlock All Enrollments]** button.

   *The **Service Delivery Report Summary** page appears.*

Important: Remember to **unlock** the SDR when you are done editing to allow users access to the clients.

Release an SDR

1. Access the **Service Delivery Summary** page.
2. Click the checkbox to confirm data is accurate and complete.

   By clicking the checkbox you are complying with legal requirements on releasing a service delivery report.
3. Click **[Release Service Delivery]**.

   *On the **Service Delivery Summary** page the **Service Delivery Progress** bar appears showing release status.*

Authorize an SDR

1. Access the **Service Delivery Summary** page of a released SDR.
2. Click the checkbox to confirm data is accurate and complete.

   By clicking the checkbox you are complying with legal requirements on authorizing a service delivery report.
3. Click **[Authorize Service Delivery]**.

   *Once the adjudication is complete, the **Service Delivery Report Summary** page appears.*

Note: If the SDR Authorizer finds an error, the SDR can be disapproved by clicking the **[Disapprove SDR]** button. Disapproving the SDR changes the status from **released** to **draft** so the error can be corrected. You can disapprove an SDR in **released** or **partially released** status (when any one of the clients on the SDR is with out any services).

Create a Supplemental SDR

1. Access the **Service Delivery Report Search** page.
2. Click **[Add/Edit SDR]**.
   The page reappears with a supplemental SDR Draft link.
3. Click the Draft link.
   *The **Service Delivery Summary** page appears with a roster of clients.*

Enter Services on a Supplemental SDR

You may need to enter services that were omitted from regular SDR. Or, if the clients on the SDR have been denied, you may need to resubmit the correct information.

1. Access the **Service Delivery Summary** page.
2. Click the Enrollment Id link for a client.
   *The **Record Service Delivery** page appears.*
3. Enter service information on the calendar and then click **[Save Change]**.
   A message appears, "Record has been updated successfully."

Void Services on a Supplemental SDR

Note: If the SDR has been paid and services were incorrectly submitted, use the **Void** button to void the entire previous month's record. You can then resubmit the correct information.

1. Repeat above steps 1 - 2.
2. Click the radio button under the **Previous Service Delivery Reports** heading.
3. Click **[Void]** and then **[Save Changes]**.
   The claim is now voided.

Copy Services

1. Click the radio button under the **Previous Service Delivery Reports** heading.
2. Click **[Copy]**.
   The previous month's regular SDR has been copied over.
3. Edit service information on the calendar, if needed.
4. Click **[Save Changes]**.
   A message appears, "Record has been updated successfully."

Search for a PRC

Track a Payment Request for Commodity (PRC):

1. Click the **Billing** module and select **PRC Search** from the navigation bar.

   *The **PRC Search** page appears.*

2. Enter search criteria.
3. Click **[Search]**.
4. Click the Activity Name link.

*The **Update PRC** page appears to view payment information.*

Note: You may not see the PRC you are searching for appear as a search result. Nightly system jobs will turn SDRs into electronic PRCs for Agency approval.

Generate, View and Save a Report

1. Click the **Reports** module and select the SDR Report link.
2. Enter criteria.
3. Select **Report Format** *(PDF is the default).*
4. Click **[Run Report]**.

   The report opens in a new window.

5. Click **File** from the menu at the top of the page, select **Save As** for **Excel file** or **Save a Copy** for PDF.
6. Navigate to the desired location; enter a title in the File Name field and click **[Save]**.

Report Trouble-Shooting

Q: Why am I not getting the results I expected?
A: Double-check that criteria filters are correct and consider user security

Q: Why doesn't this match my legacy reports?
A: Double-check that criteria filters are correct

Q: Why does my computer stall when I try to run certain reports?
A: Check your report parameters (dates, contract numbers etc). It may be the parameters you specified returned no results. Sometimes, when the system is trying to return an 'empty' report, it stalls. This does not happen every time when there are no results returned. If the system is unresponsive after five minutes, close any unresponsive windows. Reports do not run directly off the EIM/ESM service. They run from a separate database that is regularly refreshed with EIM/ESM information. The time delay for this replication is about 20 minutes, so if you just entered information into EIM/ESM, you would not be able to report on it until about 20 minutes later.
Q: When I alert customer service about reports not running or taking too long to run, what information should I provide?
A: Make a note of the report name and the date and time you attempted to run it. Provide the input parameters you used (contract number, vendor name, etc.) and how long you waited before the report timed out or you halted your efforts. If an error message appears on the screen, make a note of that as well.

Virtual Gateway Customer Service 1-800-421-0938